

Transformation Transfer Initiative 2014

Idaho Application

Background: In 2008, Idaho began actively recruiting and training peer specialists using the Appalachian Consulting Group (ACG) training curriculum. To date, more than 200 individuals have successfully been trained and passed the certification examination to become certified peer specialists. The Department of Health and Welfare, Division of Behavioral Health has also hired peer specialists to supplement and enhance Assertive Community Treatment (ACT) in mental health clinics operated statewide.

Some major recent highlights in Idaho related to Certified Peer Specialists (CPS) include:

- **Criminal Background Check Waivers:** In 2013, a variety of rule changes were enacted in Idaho that helped provide a pathway to employment for peer specialists with criminal histories, who are unable to pass background checks. A waiver process was implemented that allows for peers with background check denials to file for a waiver with the Division of Behavioral Health. Upon committee review, a waiver may be issued depending on the nature of the crime, current recovery status, restitution efforts, letters of recommendation from community partners, and other factors. This process has been included in substance use disorders, mental health and behavioral health crisis center administrative rules.
- **Medicaid Reimbursement for Services:** Optum Idaho was awarded the Idaho Behavioral Health Plan contract in September 2013 and has included Medicaid reimbursement for peer specialist services. With the addition of a Medicaid payer for the service, peer specialists have more economically viable employment options to provide their services.
- **Idaho Peer Specialists Standards:** Prior to 2014, Idaho loosely followed ACG standards related to training and certification. Using a public drafting and vetting process, the Division of Behavioral Health has published its first set of standards for Certified Peer Specialists (available at: <http://tinyurl.com/kcyxjjv>). These standards encompass the expected competencies, assurances, certification and accountabilities for Idaho CPS. As we advance the system, all activities conducted by the division or its partners are validated against these standards.

Proposed Project: Despite many of the enhancements and changes occurring within the Idaho system, multiple gaps still exist that challenge our ability to respond quickly and appropriately to customers, partners and community needs. Within Idaho, the CPS training covers a variety of competency areas identified in our standards. As the use of CPS expands, several specialty areas have been identified that are not currently covered in the certification training. These most recent specialty areas to emerge as a training need in Idaho include providing peer services to: 1) Behavioral Health Crisis Centers, 2) Criminal Justice Populations, and 3) individuals with co-occurring mental health and substance use disorder issues. Our vision for this project includes building

three specialty certifications that CPS may obtain as part of their ongoing training and entering into a specialty system that requires additional training to work within a specific population/facility (Illustration 1). These specialty certificates will be obtained in face-to-face trainings (2 day each) and the curriculum will be customized to Idaho’s specific needs and will be available for other states to evaluate and adopt.

Illustration 1.



Each Specialty Certificate will follow a similar process for development, financial mapping, publication, training, train-the-trainer, and ownership. A full timeline has been provided in Appendix A. Matrix 1 below illustrates the anticipated partners, milestones and outputs.

Matrix 1.

	Behavioral Health (BH) Crisis Center Certificate	Criminal Justice Certification	Co-Occurring Certification
Anticipated Partners	<ul style="list-style-type: none"> Idaho Falls BH Crisis Center Board† Region 4 BH Board BH Policy Unit 	<ul style="list-style-type: none"> Idaho Supreme Court† Office of Consumer and Family Affairs County Mental Health Specialty Courts 	<ul style="list-style-type: none"> SUD MSC (BPA)† Recovery Idaho BH Operations Unit
Curriculum Development	1-3 months	3-4 months	2-4 months
Training Roll- Out	2 months	3 months	3 months
Outputs	BH Standard Training Materials Cadre of Trainers (10)	BH Standard Training Materials Cadre of Trainers (20)	BH Standard Training Materials Cadre of Trainers (15)
†Letter of Support	Appendix E	Appendix F	Appendix G

Each certificate will be treated as a separate project following the same format.

Step 1: Identification of all partner and participants, some of which have not yet been identified in Matrix 1.

Step 2: A contractor will be utilized to facilitate a multi-day curriculum planning meeting and financial mapping exercise in which the training contents and potential funders will be established.

Step 3: All partners will take outputs/products back to their respective organization for vetting, comment and ultimately support of the certificate.

Step 4: Contractor will design training materials for the certificate and establish at least one on-site training in Idaho.

Step 5: Project Sponsor, along with the support of the stakeholder group, will review and approve the training curriculum submitted.

Step 6: Contractor will conduct multi-day certificate training (25 participants per training).

Step 7: Train the Trainer training will occur immediately following certificate training.

Step 8: Within one year of receiving instruction, trainers will conduct a training for the specialty CPS certificate they have been trained to teach.

Budget: Appendix B contains all the anticipated budget expenses and full details requested in this application.

Outcomes/Deliverables: In addition to producing three distinct training curricula that can be shared and used by other entities (i.e. states and consumer-run organizations), we anticipate the funds to support an infrastructure development and partner buy-in process that will help ensure the products are appropriate for our needs and favorably received by the Idaho system. Further, we will be conducting pre and post evaluations of the planning process and trainings to support achievement of identified project goals. Additionally, we will be conducting a capacity study as part of the conclusion of the project to establish the real results achieved through the project and target numbers to be trained in the subsequent 3 years.

Anticipated Project Data:

- Partner Planning: Pre/Post Survey Analysis
- Certificate Training: Pre/Post Survey Analysis
- Descriptive Statistics of the trained workforce and trainers.
- Study and analysis of development capacity for the next 3 years.

Coordinator/Contact Information:

The Policy Unit is responsible for infrastructure activities within the Division of Behavioral Health. As such, Casey Moyer, LMSW will be the coordinator if the division is awarded the funding. As the program manager of the unit, Casey acts as the principle investigator on multiple grants, coordinating staff, contractors and other activities as required. This project is anticipated to incorporate multiple units with the Division of Behavioral Health, as well as community partners and stakeholders. Additional technical and human resources will be accessed in the course of administering this project and additional resumes and names are available upon request.

Appendix A

Timeline:

Date:	Phase:	Activity:	Measurable Outcome:
Award (A)	Initiation	Letter of Award and contract are received. RFP is drafted for Certificate contractor	Draft RFP
A + 14 days (D)	Initiation	Contract is executed	Signed contract
A + 15D	Resource Procurement	RFP for 3 Certificate programs is published:	RFP Posted to Procurement System
A + 45D	Resource Procurement	Bids evaluated and contract award is made to successful bidder	Completed Contract Award
Month 1	Stakeholder	All stakeholders for BH Crisis Center Certificate are identified and invited to planning session.	Stakeholder Roster
Month 2	Development	BH Crisis Center Certification Planning Meets in Boise, ID	2-day Planning meeting documentation and discussion outputs
	Stakeholder	All Stakeholders for Co-Occurring Certificate are identified and invited to planning session	Stakeholder Roster
	Stakeholder	All Stakeholders for Criminal Justice Certificate are identified and invited to planning session	Stakeholder Roster
Month 3	BH Crisis Center Certificate	BH Crisis Center Certification curriculum is finalized and submitted for approval by sponsor	Draft Curriculum
	Development	Co-Occurring Certification Planning Meets in Boise, ID	2-day Planning meeting documentation and discussion outputs
Month 4	Training	BH Crisis Center Certificate Training is Scheduled and Promotional materials generated – applications accepted.	Finalized Curriculum and Promotional materials
	Co-Occurring Certificate	Co-Occurring Certification curriculum is finalized and submitted for approval by sponsor	Draft Curriculum
	Development	Criminal Justice Certification Planning Meets in Boise, ID	2-day Planning meeting documentation and discussion outputs
Month 5	Training Event	Accepted Applicants attend BH Crisis Center Certificate Training + Train the Trainer	Attendee Data
	Training	Co-Occurring Certificate Training is Scheduled and Promotional materials generated – applications accepted.	Finalized Curriculum and Promotional materials
	Criminal Justice Certificate	Criminal Justice Certification curriculum is finalized and submitted for approval by sponsor	Draft Curriculum
Month 6	Evaluation	BH Crisis Center Stakeholder Group reconvenes to evaluate training and map out future activities.	3 year Plan
	Training Event	Accepted Applicants attend Co-Occurring Certificate Training + Train the Trainer	Attendee Data
	Training	Criminal Justice Certificate Training is Scheduled and Promotional materials generated – applications accepted.	Finalized Curriculum and Promotional materials
Month 7	Evaluation	Co-Occurring Stakeholder Group reconvenes to evaluate training and map out future activities.	3 year Plan
	Training Event	Accepted Applicants attend Co-Occurring Certificate Training + Train the Trainer	Attendee Data
Month 8	Evaluation	Co-Occurring Stakeholder Group reconvenes to evaluate training and map out future activities.	3 year Plan
Month 9	Finalization	Compile and report on the three certificates program stakeholder data, training participant data, outcomes and sustainability efforts	Final Project Report

Appendix B

Budget

Detail:

1. Personnel: \$0

Rationale: Coordinator and state staff who will support this project will be in-kind. It is anticipated that the project coordinator will be spending at least 0.1 FTE with an additional total 0.4 FTE being rendered by various other state staff throughout the project.

2. Fringe: \$0

Rationale: There are no anticipated personnel expenses with this project; they are provided in-kind and will not require a fringe calculation

3. Travel: \$45,900

Rationale: Travel by stakeholder and participants will be required.

- a. Stakeholder Planning: It is anticipated that three (3) stakeholder planning meetings will occur in months 2-4. 15 participants per group, 8 requiring travel support. 8 participants x 3 planning meetings x \$400 in hotel, mileage and per diem (2.5 days) = \$9,600*
- b. Training: Attendees of the certificate training will be offered travel scholarship to assist in the cost of attending the training and train the trainer. 30 participants per certificate; 15 travel scholarships will be offered for qualifying individuals. 15 scholarships x 3 trainings x \$700 in hotel, mileage and per diem (5 days) = \$31,500* *Additional travel scholarships are anticipated from partner funding as a results of the financial mapping in stakeholder planning session.*
- c. Evaluation: Travel by stakeholders after the training is completed for evaluation and future planning. 15 Participants, 8 requiring travel assistance, 1 Day meeting. 8 Participants x 3 evaluation sessions x \$200 in hotel, mileage and per diem (1 day) = \$4,800*

4. Equipment: \$0

Rationale: The Division of Behavioral Health has state funded equipment we are able to use during this project. There are no anticipated equipment costs.

5. Supplies: \$2,600

Rationale: We anticipating various supplies being required to host a facilitated meeting and provide all necessary printed material to stakeholder participants. Further, we will print all curriculum materials for the training events and the first round of training facilitated by the trainers.

6. Contractual: \$171,500

Rationale: Contracting with a single peer run organization we anticipate purchasing:

- a. Facilitation of three (3) certificate planning meetings – 2.5 days each

- b. Compiling three (3) certificate curricula based on the planning outcomes.
- c. Conducting three (3) certificate trainings and follow-up Train the Trainer sessions immediately afterwards – 5 days each
- d. Facilitating three (s) evaluation and sustainability sessions post training – 1.5 days each

7. Other: \$0

Rationale: There are no anticipated expenses beyond the already identified categories.

8. Indirect: \$1,000

Rationale: The Department used a federal cost allocation plan to calculate indirect expenses related to supporting the transactions required by this grant.

*Additional detail is available upon request regarding this budget line item.

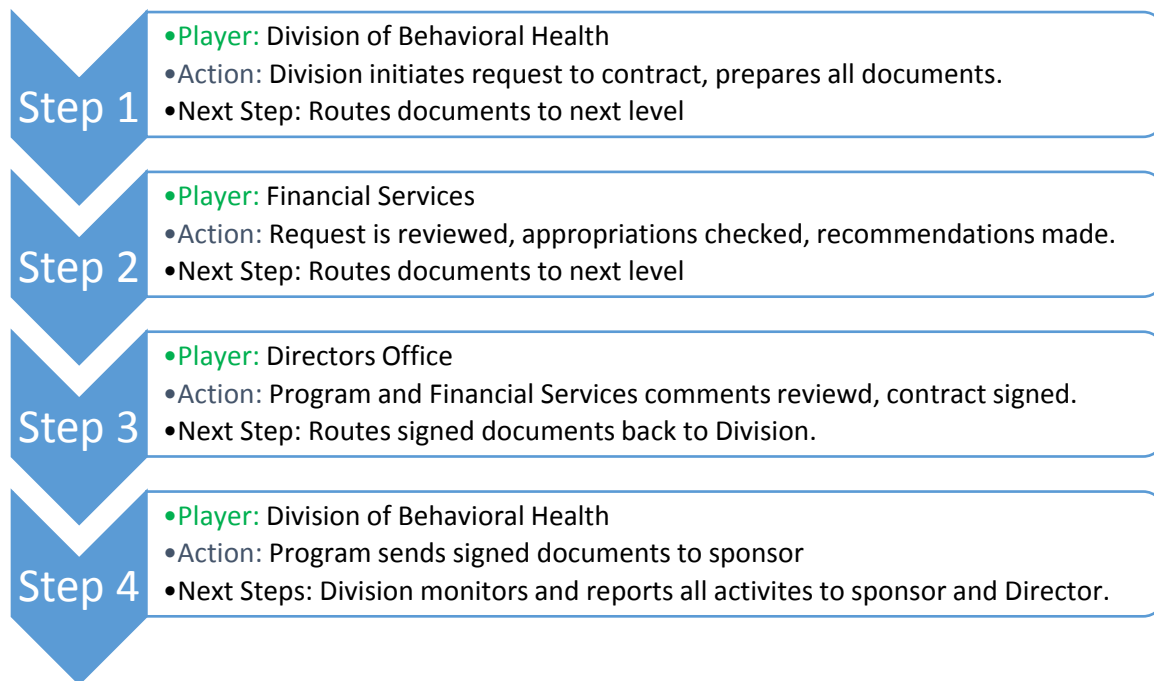
Summary:

Category	Requested
Personnel	\$0
Fringe @ 38%	\$0
Travel	\$45,900
Equipment	\$0
Supplies	\$2,600
Contractual	\$171,500
Other	\$0
Total Direct Costs	\$220,000
Indirect Costs (est)	\$1,000
Total Project Costs	\$221,000

Appendix C

Contracting Process Description: The Division of Behavioral Health resides under the state agency, Department of Health and Welfare. Richard Armstrong, Agency Director, and his designee are business representatives authorized to sign and engage in contracted services. The Department of Health and Welfare has a three-tiered review process to request permission to engage in a contract (Diagram 1). Typically the routing and approval process takes 10 business days when a completed information packet is submitted. Questions, missing documents, or additional information requests slow the process down.

Diagram 1.



Appendix D

Project Lead Resume (PDF Attachment)

CASEY MOYER

1210 Shenandoah Drive • Boise, ID 83712 • (509) 993-3777 • Casey.Moyer@ymail.com

INNOVATIVE, HARD-WORKING AND TECHNICALLY SKILLED **HUMAN SERVICES SPECIALIST** known for resourcefulness, excellent communication skills, attention to detail and timeliness in managing various operational functions for employers. Over 7 years experience in both private and public sector behavioral health services and has included accountability for participant's program benefits, \$15M in contracts management, & information system project management. Backed by solid credentials (BA & Masters) and proficiencies in evidenced based human services practices as well as aptitude with MS Office Suite, Adobe Suite, Electronic Health Records System (WITS) and Data Reporting Platforms (Business Objects).

KEY SKILLS

- Develop, Extend & Execute Organizational Policy
- Stakeholder & Special Projects Facilitator
- Federal/State Compliance & Reporting
- Organizational Infrastructure Development
- Contract Negotiations & Monitoring
- Licensed Therapist
- Budget Preparation & Reporting
- Program Management & Operations
- Principle Grant Investigator
- Children's Mental Health Subject Matter Expert

PROFESSIONAL EXPERIENCE

IDAHO DEPARTMENT OF HEALTH & WELFARE; DIVISION OF BEHAVIORAL HEALTH – Boise, ID

Program Manager, Policy Unit, September 2012 - Present

Principle Accountabilities: coordinate and lead staff assigned to develop internal and statewide operations policy within the Division of Behavioral Health; identify, procure and implement federal infrastructure grants to enhance the Idaho treatment services and funding array; coordinate data and quality assurance activities including narrative reports on federal projects; developing best practice treatment standards; serving as the Children's Mental Health Director on NASMHPD; technical assistance to statewide stakeholders and partners including training and policy.

Key Results:

- Supervising Parenting with Love and Limits (PLL) program, an evidence-based therapeutic modality, including in house fidelity management, budgeting, policy and quality assurance.
- Principle Investigator of federal grant project DIG-IV.
- State subject matter expert on behavioral health policy and Medicaid fair hearing proceedings.
- Workgroup and strategic planning facilitation of state leaderships and stakeholders for multiple Behavioral Health Programs (Children's Mental Health, Adult Mental Health, State Hospitals, Substance Use Disorder Treatment Services).
- Idaho statute and rule promulgation, conducting public hearing, providing testimony and supporting legislative inquiries.
- Development of statewide Behavioral Health Care Standards.

Human Service Program Specialist, August 2009 – August 2012

Principle Accountabilities: coordinate development and implementation of statewide human services program delivery system within public sector; develop programs, policies and implementation methods; develop grant proposals and monitor procedures; prepare requests for proposals, review and select applications, develop & negotiate contracts; provide input in development of the state service plan and policy; compile and analyze data and information to identify program and service needs; performing quality assurance reviews of service delivery programs; monitors state activities for compliance with federal requirements; prepares case reviews on crises cases and on service delivery system; serves as spokesman and subject matter expert in specialty area.

Key Results:

- Management of statewide IT project utilizing CMMI development for creation and implementation of statewide web-based Behavioral Health Information System and Electronic Medical Record resulting in \$100K in program savings annually.
- Implemented web-based consumer feedback processes and service for purposes of collecting federal and state data elements of various Department programs resulting in efficiencies and savings.
- Managed multiple state contracts for services including contract negotiation, writing, consultation, compliance & payment releasing.

Professional Experience (continued)

Appendix E

Letter of Support (PDF Attachment)



IDAHO DEPARTMENT OF HEALTH & WELFARE

CL. BUTCH OTTER - GOVERNOR
RICHARD L. ANNE - COMMISSIONER

TRACY E. SEXTON - Hospital Administrator
STATE HOSPITAL SOUTH
700 East Main Street
P.O. Box 400
Bozeman, Idaho 83221-0400
PHONE - 208-985-1400
FAX - 208-985-2100
EMAIL - ssexton@idaho.gov

December 8, 2014

Idaho Department of Health & Welfare
Division of Behavioral Health
450 W. State Street, 3rd Floor
Boise, ID 83702

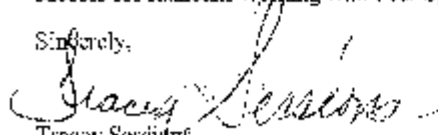
To Whom It May Concern:

The mission of the Behavioral Health Crisis Center of East Idaho is to create a welcoming and hopeful environment to empower people to reconnect to themselves, family, and others and assisting them on their path to reach their potential, whatever that may be. Peer Specialists play a crucial role in carrying out our mission at the crisis center; however, the individuals we serve have unique needs that require Peer Specialists to have the ability to rapidly, appropriately, and accurately respond. Currently, the Peer Specialist field in Idaho is still emerging, and the existing certification training lacks focus on specialty populations/facilities.

As a Crisis Center Advisory Board Member, I have had the opportunity to review Idaho Department of Health and Welfare's (IDHW) application for Peer Specialist specialty certificates under the Transformation Transfer Initiative 2014 grant. I believe that the additional training provided to Peer Specialists under this proposal will address the need for specific knowledge that will be beneficial in working with Idahoans within the identified specialty populations/facilities. The Behavioral Health Crisis Center Advisory Board commits to working with community partners to develop specialty curriculum and train ten Peer Specialists under the Behavioral Health Crisis Center Certificate.

I appreciate this opportunity to extend my support of specialty training curricula for Peer Specialists in Idaho. I am confident that this innovative approach to an emerging field in our state will offer hope and success for Idahoans working with Peer Specialists.

Sincerely,


Tracy Sexton
Idaho Crisis Center Advisory Board Member

STATE HOSPITAL SOUTH
Accredited by:
THE JOINT COMMISSION

Appendix F

Letter of Support (PDF Attachment)

THE STATE OF IDAHO
SUPREME COURT



HON. LINDA COPPLE TROUT
INTERIM ADMINISTRATIVE DIRECTOR
208-334-2246

451 W. STATE STREET
P.O. BOX 83720-0101
BOISE, ID 83720-0101

December 10, 2014

To Whom It May Concern:

The Idaho Courts are pleased to offer support to the Idaho Department of Health and Welfare's application for the Transformation Transfer Initiative 2014 grant. Idaho's courts operate a number of well-developed and interagency supported problem-solving courts that serve justice-involved individuals who have behavioral health disorders.

The proposed project will result in the development of population- and service-specific curricula for Peer Specialist services specifically designed to support and meet the service needs of individuals who are involved with the criminal justice system. These specialized Peer Support services will link individuals with appropriate needed community services accurately and in a timely manner. The Courts agree that the development of specialized training criteria and a cadre of trainers will enhance services to this population.

We support this effort and believe that it will be of great benefit to the Peer Specialist system in Idaho, as well as the participants of problem-solving courts and the communities within our state.

Sincerely,

A handwritten signature in blue ink, appearing to read "Linda Copple Trout".

Hon. Linda Copple Trout
Interim Administrative Director of the Courts

LCT/st

Appendix G

Letter of Support (PDF Attachment)



b p a
excellence in mind

Business
Psychology
Associates

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Suite 300
Boise, ID 83706
(208) 336-4275
1-800-211-9477
www.bpahealth.com

December 8, 2014

To Whom It May Concern:

Business Psychology Associates (BPA) has had the opportunity to work with the Idaho Department of Health and Welfare's (IDHW) Substance Use Disorders Program for the past fifteen years as a management services contractor. Throughout this extensive partnership, BPA and IDHW have collaborated on many efforts.

After reviewing IDHW's proposal for the Transformation Transfer Initiative 2014 application, BPA supports the proposal and looks forward to further collaboration with IDHW and other community partners to implement specialty training models for Peer Specialists in Idaho. Our organization, including our statewide network of treatment and recovery support service providers, are well prepared to assist in implementing this effort. BPA will work with IDHW to develop curriculum, identify, and train a cadre of 15 trainers.

BPA supports and looks forward to advancing this important endeavor and sees it as a promising opportunity to meet unique needs of Idahoans through specific Peer Specialist services.

Sincerely,

Sarah Woodley
CEO